May 2021 Edition #23

PSA TRAINING UPDATES

Kootenay Savings Credit Union (KSCU) PSA Training has passed the half-way point and they working through the New Client Onboarding Process.

Revelstoke Credit Union (RCU) PSA Training was launched in April and is slated for full steam ahead in May!

We are also working with the **PSA MFIS Group** to get them PSA Certified!

ANNUAL CLIENT EXPERIENCE RECOGNITION

The purpose of the ACE process is to ensure you have all the understanding, tools & capacity to continue to achieve the following:

- **Pillar 1:** Client Classification & an Updated **Client Analysis**;
- **Pillar 2:** Active delivery of the **Client Experience** including Review Meetings, Relationship Calls, Thanksgiving Cards & Moments of Truth;
- **Pillar 3:** Adoption of the core resources for the **Client Onboarding** Process;
- **Pillar 4:** Progress and ultimate completion of any clients who are **transitioning or being rebranded**; and
- Full **Maximizer CRM Integration**.

As we approach mid-year, I am getting set to reach out to individual **Financial Planning** teams in June to see how things are going as well as, celebrating the progress they are making towards rebranding and delivering the planning and PFO Binders to your top clients.

All Financial Planners PSA Certified in 2020 will be participating in their **first annual ACE Recognition this fall**.

In addition, all **PSA Certified Associates & MFIS** who are actively servicing their own clients will be participating in the ACE Process for the first time. I recommend you begin assessing your level of implementation in each of the 4 Pillars.

WOW YOUR CLIENTS!

You know we are all about providing the **exceptional client experience** and **creating WOW moments** along the way.

I recently came across a WOW Workbook which is a great reinforcement of the concepts we've covered but also includes some 'next level' WOW!

See the WOW Workbook attached for some awesome ideas!

Have fun making the day of your very best clients :)

QUESTIONS FROM THE FIELD

"Do you have any recommendations for how to prioritize items when the 'to-do' is quite long?"

This is a common situation, especially for 'serial' users of Maximizer – which by the way, is a good thing :) I too often endeavour to get way more done than I actually can in a day and many of us do.

I recommend you use a system to prioritize based on a combination of factors:

- **Client Classification** – This is a major driver and "A" clients should be high priority.

- **Priority Setting** – This is a great feature in Maximizer recently shared with me by an avid user! She set's items of importance to 'High' priority making them easy to spot in a long list of items and making sure they get completed in a timely manner.

- **Type of Task** – There may be specific types of tasks on a daily or weekly basis you complete that are non-negotiable.

As you can see, it's complicated and requires discipline and a process! Again, a reminder if you double click on the top of any column while in your hotlist, it will automatically organize by that column (date, client classification, activity, etc.).

I also recommend that in order to stay on top of it on a daily basis you practice the Do, Defer, Delegate or Delete method. Ideally, get it done and mark it off as complete. Alternately, defer it by moving it ahead to a date when you know you will have time but still meets the deadline. Another option is to delegate it to someone else on your team who can assist. The last resort for tasks that are so out of date they are now irrelevant is to delete – this may happen if we get way behind on our Relationship Calls.

Sidebar: I know some of you have mentioned you are still paper based with your tasks so remember when viewing your list, you can export to Excel and print it! This way you can cross it off on the paper, make follow up notes and then translate this to your Maximizer.

IS IT TIME FOR MAXIMIZER SPRING CLEAN?

Just like everything else in life, sometimes our database feels a little unruly and out of control. If you are feeling overwhelmed by your task list or if there is something consistently problematic with how you are interacting/using Maximizer, this is the perfect time to do a 'spring clean' of your data base.

- Make sure all of your households are accurate and up-to-date – Remove any non-clients, those who've transferred out, passed away, or are now working with someone else within the organization.

- If they are working with someone else in your organization who has Maximizer, make sure that the Lead Advisor aligned with them, but also that all existing activities have been realigned from yourself to the new relationship owner so they don't show up on your to-do list.

- Remove any duplicate records which often create a recipe for disaster.

- Update important fields once and for all to avoid wasting time searching for key information.

I encourage you to set aside a morning, afternoon or even a whole day to get organized with your Maximizer. And if there is something you've been meaning to integrate or learn about it, do it! Taking 15 minutes to watch a 'how to video' once can often save hours and hours of time over the life-time of your use! Small term pain, for long-term gain!

MAXIMIZER CRM

MAXIMIZER TRAINING VIDEOS

We just created an **Introduction to Maximizer Video** last week and it is now loaded onto the CUSO Training Portal. It covers the four main places worked in as well as, includes some tips and tricks around setting up views and organizing tabs.

If you are fairly new to Maximizer or would like a refresher, I encourage you to watch it at your convenience.

HAVE AN ENERGIZED & INSPIRED MONTH OF MAY!